



University SHRA Annual Performance Appraisal Form

ANNUAL PERFORMANCE APPRAISAL CYCLE (Dates From/To):		April 1, 2018	to	March 31, 2019
Dept. Name:	Budget Office	Employee Name:	Lisa Bernard	
Dept. #:	2320	Employee ID:	830023596	Position #: 90
Supervisor Name:	Steve Mack	Employee Classification:	Accounting Tech	
Supervisor Title:	Budget Director	Competency Level:	Journey	

PART 7: ANNUAL PERFORMANCE APPRAISAL

(see instructions on page 2)

- Rate each **Individual and Institutional Goal**:
 - 1 = Not Meeting Expectations
 - 2 = Meeting Expectations
 - 3 = Exceeding Expectations
- Multiply the **Weight** by the **Rating** to get the **Score** for each goal. Use two decimal places. (Example: 10% x 2 = 0.20)
- Add all of the **Scores** together to assign a **Final Overall Rating**:
 - 1.00 to 1.69 = Not Meeting Expectations
 - 1.70 to 2.69 = Meeting Expectations
 - 2.70 to 3.00 = Exceeding Expectations
- Provide **comments** and **signatures** on the next page.

#	INSTITUTIONAL GOALS	(see descriptions in performance plan)	Weight	x	Rating	=	Score
1	Expertise		10	x	.2	=	.20
2	Accountability		10	x	.2	=	.20
3	Customer-Oriented		10	x	.3	=	.30
4	Team-Oriented		10	x	.2	=	.20
5	Compliance & Integrity		10	x	.3	=	.30
6	Supervision (if applicable)			x		=	

#	INDIVIDUAL GOALS	(title only from performance plan)	Weight	x	Rating	=	Score
1	Process PPA Forms, Track Positions, People Admin Processing		25	x	.3	=	.75
2	Prepare Quarterly Vacancy Report		10	x	.2	=	.20
3	Budget Management		15	x	.2	=	.30
4				x		=	
5				x		=	

FINAL OVERALL RATING	(mark the appropriate rating based on total score)	TOTAL SCORE	=	2.45
Has the employee received a disciplinary action during this performance cycle and/or received any rating of 1 (Not Meeting Expectations) on this appraisal? If YES , then the final overall rating cannot equal Exceeding Expectations, regardless of the total score.			YES	
			NO	NO
NOT MEETING EXPECTATIONS		MEETING EXPECTATIONS	YES	EXCEEDING EXPECTATIONS